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TITLE:

AUTOMATIC GENERATION OF
PERSONAL HOMEPAGES FOR A
SALES FORCE

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AUTOMATIC GENERATION OF PERSONAL HOMEPAGES FOR A SALES FORCE

[0001] This invention claims the benefit of U.S. Provisional Application, No. 60/273,158, filed March 1, 2001, which is hereby incorporated by reference herein.

FIELD OF THE INVENTION

[0002] This invention is directed to generating Internet homepages and, more particularly, to a system and method for generating Internet homepages for members of a sales force.

BACKGROUND OF THE INVENTION

[0003] As electronic commerce and the information economy become more popular, it is important that all organizations, and particularly large organizations, have a presence on the Internet. Nowhere is this more important than in an organization's sales and marketing efforts. While marketing is important to all companies, it is particularly important to companies and organizations where the human channels are the main sales vehicle, such as those offering financial services, such as stocks, bonds, investments, insurance policies, annuities and the like.

[0004] It is important for these companies to maintain the personal relationship between the members of their sales force and their customers while taking advantage of the Internet. In addition to resolving channel cannibalization issues, many organizations are fighting the inertia of a sales force that may be uninformed or fearful of the Internet's impact on their job functions. Moreover, conventional methods for creating web pages are labor intensive and require specialized skill sets. These companies need a way to quickly provide an Internet presence for the members of the sales force to maintain the human personal contact to their current customers who may be increasingly embracing doing business in an impersonal manner over the Internet. These companies need a vehicle to quickly provide their sales force

with a relevant presence on the Internet that complements, rather than competes, with the companies other Internet marketing initiatives.

SUMMARY OF THE INVENTION

[0005]

The invention provides a system and method for automatic generation of personal web pages for members of a sales force of an organization. One embodiment of the system includes an application server linked to a database containing personal data describing sales force members. The application server includes a content management server and a content delivery server. The content management server includes a predefined homepage template. Personal data describing the sales force members is available to the application server, which automatically populates the homepage template when requested, thereby generating a personal homepage for the member on the application server. Preferably, the homepage is accessible through the Internet.

[0006]

One embodiment of the method includes defining a template for a personal homepage, entering data into a computer system that identifies at least one member of the sales force, receiving personal data associated with the identified member from a human resources database, automatically generating a personal homepage for the member by populating the template with the personal data, the personal data communicated from a human resource database, and making the personal homepage accessible through a publicly distributed network, such as the Internet.

[0007]

Preferably, updated data is periodically retrieved from the human resource database, and the member's homepage is automatically disabled from the Internet when the human resource database indicates that the member's employment with the organization has been terminated. Preferably, the sales force member may customize the homepage by selecting real time content from a plurality of information content sources, and selecting or entering personal descriptive information that populates the homepage.

BRIEF DESCRIPTION OF THE DRAWINGS

- [0008] Figure 1 is a flow chart for generating personal homepages according to a first embodiment.
- [0009] Figure 2 is a flow chart depicting a process for generating personal homepages.
- [0010] Figures 3 and 4 are block diagrams of systems according to preferred embodiments.
- [0011] Figure 5 is a block diagram of a system for generating personal homepages for financial consultants and financial branches.
- [0012] Figure 6 depicts a block diagram of a system that transfers information between financial consultants and customers using personal homepages via the Internet.
- [0013] Figure 7 is a system, showing another embodiment of the invention.
- [0014] Figure 8 is an exemplary personal homepage for a financial consultant.
- [0015] Figure 9 is an exemplary personal homepage for a team of financial consultants.

DETAILED DESCRIPTION OF THE PRESENTLY PREFERRED EMBODIMENTS OF THE INVENTION

- [0016] The invention helps to retain present customers by generating personal homepages for better and easier access to information about salespersons or financial consultants, as well as services available from the organization. In addition, the homepages for the organization's branch offices help generate additional leads for salespersons, and help enable the sales force to provide more personal and convenient services to on-line clients. Thus, the use of this invention strengthens the relationships between present customers and the sales force, as well as enabling new relationships with new customers.
- [0017] One embodiment of the invention provides a combination of electronics and software that generates personal homepages for a sales force using personal data stored on the organization's personnel database. Typically, personal data for each salesperson is entered into a computer database, such as a human resources database, when the person is first employed by the

organization. The database preferably is resident to a privately accessible distributed network. The data may reside in a single database or file, or may reside over a number of data structures distributed across a company's network. Preferably, the personal data includes biographical data, such as the salesperson's name, address and educational background. The data may include the sales person's qualification, certifications, licenses, and the like. The data may also include a photo portrait or image of the person.

[0018]

To initiate the process to generate a personal homepage, a salesperson accesses the homepage building application via a Wizard user input interface on a workstation. The person enters data identifying himself into a computer system. Alternatively, the data is provided to the system using a single sign-on protocol on the workstation that authenticates the person's identification and makes such identifying data available to applications accessed via the workstation.

[0019]

Personal descriptive information about the salesperson may be entered for display on the homepage. For example, if the salesperson is a financial consultant working for an investment broker, the personal descriptive information may include his or her investment preferences and business philosophy, any area of expertise or specialty, or any technical expertise likely to inure to the customer's benefit, for example. Alternatively, to simplify this process, the personal descriptive information may selected from a variety of prepared pre-approved personal descriptive information that the salesperson believes to be relevant.

[0020]

In addition, the salesperson may select live content information, for example, real-time media, from content providers that may be relevant to the customers. The salesperson's organization or other outside sources may provide the live content information.

[0021]

The information entered and selected by the salesperson, along with existing biographical data retrieved from a human resources database, are populated in a predefined homepage template. The information so entered, is used to automatically generate a homepage for the salesperson. The homepage is then posted to a Web server for viewing on the Internet or a

World Wide Web portion. In some cases, it may be desirable for the homepage to be reviewed by the salesperson's manager for approval when personal descriptive information is entered by the salesperson rather than being selected from pre-approved descriptions.

[0022]

In addition, each homepage may be made more attractive to a customer by adding information and computer links to other sites favored by the salesperson or the organization.

[0023]

It is desirable for the employer to prevent access to homepages of salespersons who have left the organization. In a preferred embodiment, when a salesperson leaves the organization, human resources is notified, and an entry in the financial consultant's or salesperson's personnel records is made that he or she is no longer employed by the organization. After this entry is made in the human resources database, when the system receives updated personal data from the human resources database, the system automatically disables any viewing of that person's homepage through the Internet. Likewise, if the salesperson is transferred to a non-sales position within the organization, data indicative of this status may be entered in the human resources database, which then is used to disable the person's homepage.

[0024]

Fig. 1 depicts a process for generating a personal homepage accessible through the Internet. When a salesperson desires to create a personalized homepage, that person accesses a program, such as a Wizard or user query program, to create the homepage. The person either enters data to identify himself, or the workstation provides such data authenticated by a single sign-on protocol. Typically, when an employee is hired, an organization enters personal data for each employee into a human resources database, or other equivalent database, resident to a private network. This existing personal data is associated with the data identifying the employee. A computer system that includes one or more predefined homepage templates 12 is automatically populated with the existing data 10 associated with the identified salesperson and made available on an application server 14. The application server generates a personalized homepage 16 that is available for

access from a publicly distributed network such as the Internet. In this manner a salesperson may allow a customer to view the salesperson's personal homepage by providing the URL for the particular homepage to the customer.

[0025]

In a preferred method of this invention, the biographical data originates in a human resources database resident in a privately accessible distributed network. A computer system harvests or receives the data residing in the database, and uses the data to automatically generate the personal homepages.

[0026]

Fig. 2 is a flow chart of a process that converts the data mentioned in Fig. 1 into personal homepages. Personal data is entered into a computerized database, preferably when the organization hires each salesperson. When it is desired to create a personal homepage, that personal data 20 is retrieved. A template 22 is populated with the data and posted to an application server 24. It may be desirable for the salesperson, or for the organization, to preview and approve the homepage 26. Optionally, one or more managerial levels may be required for approval of each home page before it is posted. After the application server receives indicia of approval, a personal homepage is generated 28 and made available for viewing on the Internet.

[0027]

Figs. 3 and 4 depict computer systems embodying the present invention. Fig. 3 depicts a generalized system in which customer terminals 32 and 34 are coupled with server terminals 36 and 38 through the Internet. In this embodiment, an organization has a server terminal 36 operably connected to the Internet 30 to make personal homepages of its salespersons accessible through the Internet. Alternatively, the organization may have more than one server available for such service, such as a primary server 36 and a backup server 38. Each server has at least a computer memory or database 40 and 44 to store content, and a data processor 42 and 46. The data processors are configured to manage the content available on the server, and deliver the content to remote sites. Preferably, the web servers reside within a hosting facility or an application service provider off-site.

[0028]

Fig. 4 depicts a computer system tailored to an organization providing financial services. In this embodiment, a financial consultant uses a customization form 50, such as a menu viewable on a graphical user interface on a computer terminal, to select information components for a homepage. The selected information is placed into a predefined template 52, which may reside in a content management server 54 in a local or remote computer or computer system. The template uses any further customization settings 56 programmed in, and personal homepages 58 are generated for each salesperson according to the preferences expressed in the customization form. The personal homepages 58 are desirably reviewed by the individual salespersons or financial consultants, and likely by at least one manager, before they are posted onto an application server 60. The content management software may utilize StoryServer software from Vignette Corp., Austin, TX. Preferably, biographical data of the financial consultants from the human resources database 62 is harvested and inserted into the customized templates on the application server 60. Database 62 may be a computer memory storage device. In Fig. 4, three options are available for use in the custom homepages. As shown, Option B has been selected and used for generating the financial consultant's personal homepage.

[0029]

In another embodiment of the invention, personal data that was entered into a human resources database about a salesperson is made available to populate a variety of homepage formats associated with the salesperson. The salesperson may create a personal homepage using personal data associated with himself. A manager or senior level salesperson may create a team homepage using the data associated with at least one salesperson, such as the team leader, or all members of the sales team. Also, a branch or local office manager may use data associated with himself to generate a branch homepage or a local office homepage.

[0030]

Fig. 5 depicts a system tailored for financial consultants, using one server for producing homepages and a separate server for posting homepages onto the Internet. As shown, the system includes parallel methods for the financial consultant and for the branch manager in developing

and managing the personal homepages of the present invention. Personal data from a financial consultant is used to generate a personal homepage. The custom or predefined templates 68 are used to generate homepages that may reside on a content management server 80, which includes a database accessible only by internal means. After the templates have been populated with the data to create a personal homepage 70, the homepage may be stored on a developmental content application server 82, and may be accessible only through the organization's Intranet. The salesperson or financial consultant may then review the personal homepage, after which a manager 72 may review it. After these reviews, the homepage may be held up pending second or final approval 84 before being published or posted to a web server 86.

[0031]

In a parallel process for creation of a team, branch or local office homepage, a manager, such as a branch manager, may also generate a homepage for a team of financial consultants, or for a branch or local office. The manager may set up a branch homepage 74 using an interface 64 to enter appropriate personal data and to select from among at least one template 76. Alternately, a template may be defined or pre-selected by higher management. After the generation and storage of such homepages, for example, on a content management server 80, the pages 78 are reviewed by the manager, and posted to a developmental content application server or Web server 82. After the review, the homepage may be held up pending second or final approval 84 before being published or posted to a web server 86.

[0032]

Web server 86 may also include ancillary hardware and software, such as a tracking and reporting system 88 to keep track of the number of hits on the Web site, and also to track personal information of the potential clients who access the Web site. This personal information may also be captured in a lead capture system 90, stored, and used for later follow-up by salespersons.

[0033]

In a preferred implementation, the content management server, the development content application server, and the production content

application server and Web server are three separate systems, all three using utilizing the StoryServer software available from Vignette Corp., Austin, TX.

[0034]

Fig. 6 depicts a similar system as Fig. 5, with the links of the client to the web server 86 of the financial consultant's organization, as another embodiment of the system. In this embodiment, a client or potential client may interact via the Internet 102 with the system through his or her personal computer 92. The client may interact with the Web server 86 through a local portal 94 of the financial services company, a direct link 96 to a homepage of a financial consultant (if the client has been given the URL of the financial consultant), a link 98 to a branch office homepage through one or more of several properties of the financial services firm, such as other Internet Sites, or advertisement links to the financial services firm. The web server may also utilize a ZIP code locator 100. In response to a ZIP code entered by a customer or potential customer on the customer terminal, the viewed web page is provided a link to or forwarded to a branch office homepage located in or near that entered ZIP code.

[0035]

As a benefit to the organization, another feature of the invention is useful for capturing marketing data. As shown in Fig. 6, a production content application server/web server 86 aggregates data from persons viewing the financial consultants' homepages and/or branch office homepages, and makes this data available to generate leads for financial consultants or marketing specialists for follow-up.

[0036]

As a benefit to the customer, the personal homepage of a salesperson may be considered a "local portal" allowing a customer access to many links and services of the organization. By logging onto the homepage of the individual salesperson or financial consultant, the customer may access many other remote sites considered interesting and informative by the organization employing the sales force. These links may bring news and other information to the customer pertinent to the goods and services they receive from the organization, thus adding value to the customer via this "virtual" salesperson-customer relationship.

[0037]

As shown in Fig. 7, the computer system features several servers for storing, processing, and making the information contained in personal homepages available on the Internet 102. One embodiment of the system includes a remote content server 110, a local server 120, and a development/set up/production server 130. Each of these servers, 110, 120, and 130, may include a content management server, 116, 126, and 136, respectively, to manage content workflow. The servers may also include content delivery servers 114 and 124, and the production server 130, which posts pages to the Internet, may include one or more content delivery servers 132 and 134. The servers also include databases or computer memory storage devices 114, 124, and 128. A database of human resources data 118 is available to the system.

[0038]

In the embodiment depicted in Fig. 7, a remote content server 110 retrieves information and content useful for the personal, team and local office homepages. The remote content server 110 feeds content to the organization's local server 120 and to the production server database 128. The local server 120 is preferably used as a development server that develops and tests concepts or allows pre-published internal viewing of the personal homepages. Server 130 is configured to allow an environment to develop, setup and produce personal, team and local office homepages. Server 130 may also comprise one or more content delivery servers 132 and 134 configured primarily as production Web servers, on line with the Internet 102, to allow users to view the homepages generated by the system. Other architectures or arrangements of equipment are possible, as will be realized by those skilled in the art, in alternative embodiments for the invention.

[0039]

It may be useful for the organization employing the salesperson to obtain a modicum of information from a potential customer. For instance, it may be desirable to channel a customer or investor into a branch or office near the customer's or investor's residence or workplace, in order to foster a relationship between the customer or investor and a salesperson. Thus, in one embodiment of the invention the software may request a customer to provide a minimum data string that will locate the customer, such as a state

(of the United States), an address, or ZIP code, as a first step in contacting the organization to access a local office homepage. Using customer-provided data, the system will direct the customer to the branch or local offices near the customer by displaying links to the homepages for these offices, or redirecting the customer to the local office homepage when only one exists. The customer may then contact the branch manager, and if given a URL for a salesperson's homepage, the customer may then review the personal homepage for the salesperson at that branch or office.

[0040]

In another embodiment, homepages such as those depicted in Figs. 8 and 9 are generated and made accessible through the Internet. Figure 8 depicts an embodiment of a personal homepage for an individual financial consultant. Some of the information for the homepage is harvested from the human resources database. The information displayed via the template may be an electronic equivalent of the financial consultant's business card, including the financial consultant's name and title 140, and his or her office address 142, including at least one way of contacting the consultant, such as a telephone number, an e-mail address or a cell-phone number. The homepage will preferably include a hypertext link 144 to the homepage of the consultant's branch office. Links 146 to e-mail the consultant are another desirable aspect of the homepage, as well as other links 148 to information or services from the financial consultant or the organization employing the consultant. The homepage may include other links or attractions for an investor or potential investor, such as an opportunity to register 150 with the organization or the consultant, more information about other Web-sites 152 for the organization, current market information 154 and individual news or research 156 for the investor or potential investor. The homepage may also use appropriate places for a business philosophy 158 of the financial consultant, investor news 160, or pertinent research reports 162. Finally, the personal homepage may include legal notices and qualifications 164 of individual financial consultants. Such notices and qualifications may be sourced from the existing data residing in the human resources database.

[0041]

In one embodiment, a financial consultant may "design" his or her own homepage, or tailor it to his or her taste, by selecting components of the homepage. The homepage is desirably limited to a single page, but other embodiments could add more components and use more than a single "page" for display. The components preferably include, personal descriptive information, such as but not limited to, a professional profile, a business philosophy, products and services available from the salesperson, etc. The components may also include live content information that may be periodically (e.g. hourly) updated, such as but not limited to market news, the day's highlights, news headlines, investor news, and entertainment or lifestyle information. Other components may include local events, local seminars, requests for price or news lookups, chart lookups, driving directions to the local office, or a request for contact from a financial consultant. Some of these components may be included in the predefined template and not part of the "customizable" selections available to the financial consultant. The computer system then uses a template to automatically generate a personalized web homepage according to the components selected by the consultant.

[0042]

In another embodiment, personal homepages for financial organizations, such as a team of financial advisors, or a branch or an office of financial advisors, are generated automatically. Such a homepage is depicted in Figure 9. In addition to the common components on the homepage template, similar personalized components used for individual financial consultant's home pages may be used for a team or branch homepage as well. The team name and organization 170 may be featured, as well as the team's address and telephone numbers or other means to communicate with the team, such as email links or fax numbers 142. A description 172 of the team and its members may be presented, as well as many of the features shown on an individual homepage. These may desirably include statements of the team's business philosophy 174, availability of financial products or services 148, and research or news stories related to investing 162. Preferably, the team homepage includes an opportunity to interact or link with

the team, or obtain other information, such as via a registration link 150, as well as more information 152 about the firm employing the team of financial advisors. Other features, such as current information or stock quotations 154, are also desirable on the team homepage.

[0043]

As shown, personalized homepages may be automatically generated for individual salespersons, teams, or whole branches. Thus, with little effort, personal homepages may be "on duty" 24 hours a day. Updates are made easily through the same human resources database that is used to provide personal data for the homepages.

[0044]

Moreover, the customer has available a great amount of information concerning the particular financial consultant and his or her qualifications and expertise, as well as information concerning the organization, on the homepage. Once contact is made, and a financial consultant or branch manager has provided a URL to a customer or potential customer, the information is available whenever the customer contacts the Internet site. Information is available at no cost to the customer beyond any Internet access fee.

[0045]

Other embodiments of the invention may focus on organizations in non-financial related industries. For example, an organization of doctors, lawyers, and other professionals may find advantage from a personal presence on the Internet for its professionals. Personal information about highly qualified professionals and how they may be useful to customers is a powerful marketing or public relations tool. Data interesting to a customer or potential customer might include a professional's technical training, degrees, certifications, licenses, relevant experience or expertise, qualifications, and the like. The ability to automatically generate and update personal homepages may be especially helpful to large organizations in such service-related professions, which may have less time than others for "marketing" and other public relations functions on the Internet.

[0046]

While this invention has been shown and described in connection with the preferred embodiments, it is apparent that certain changes and modifications, in addition to those mentioned above may be made from the
